A3470-1U

The 1990 Bicycle Market in Review

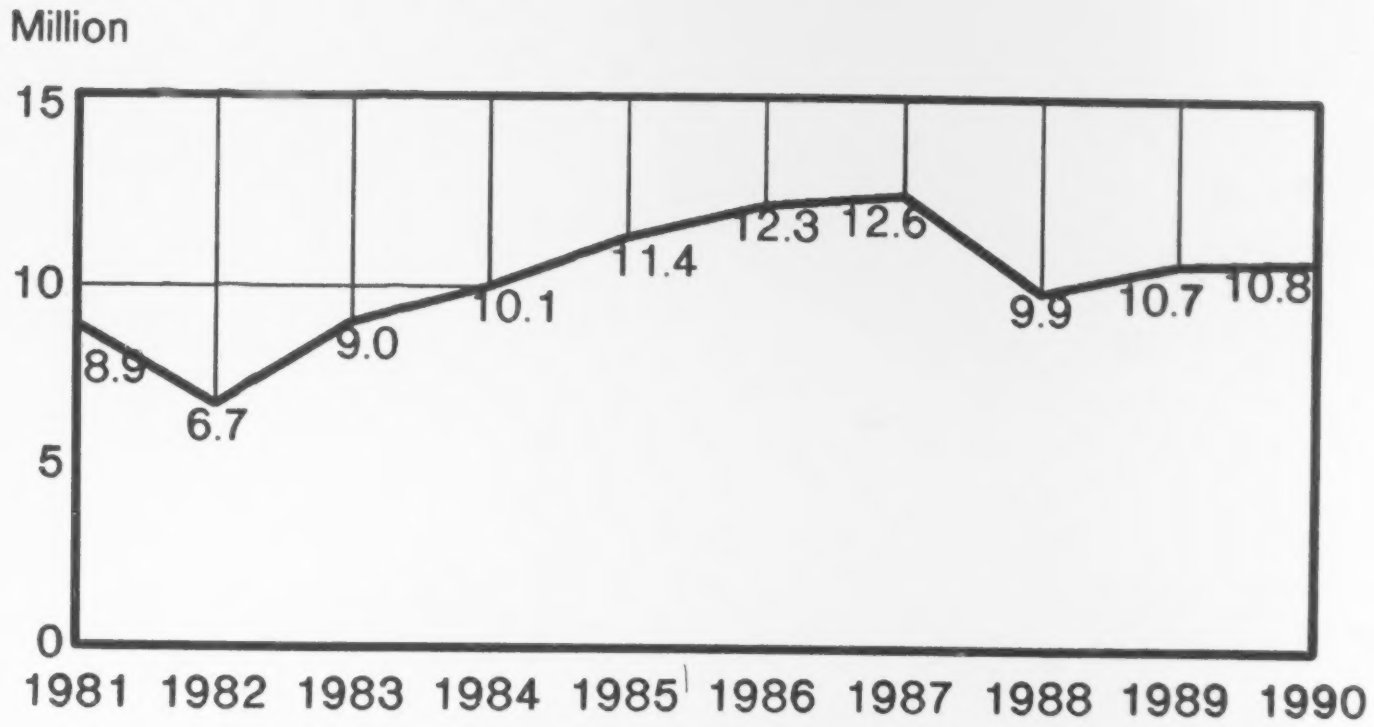
BMA

Total USA Bicycle Market
Domestic Produced Bicycles
Imported Bicycles
Summary

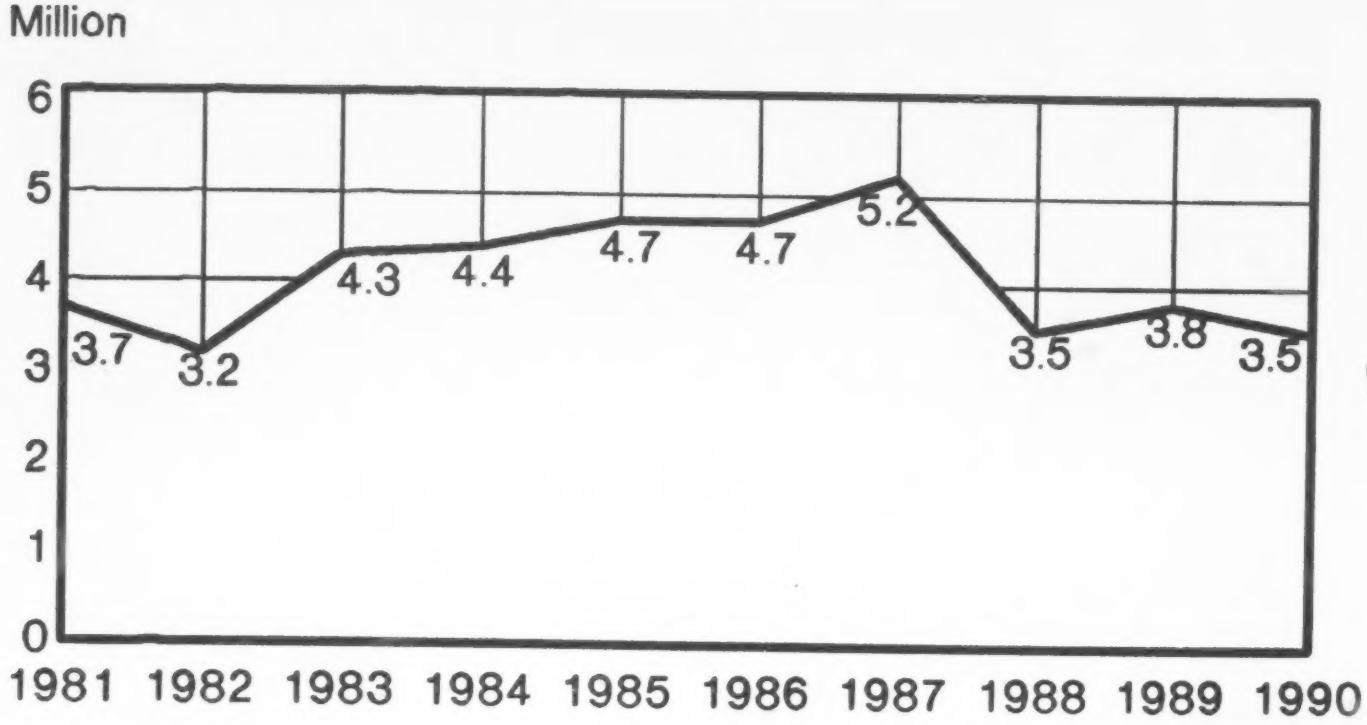
Total USA Bicycle Market

USA Bicycle Market

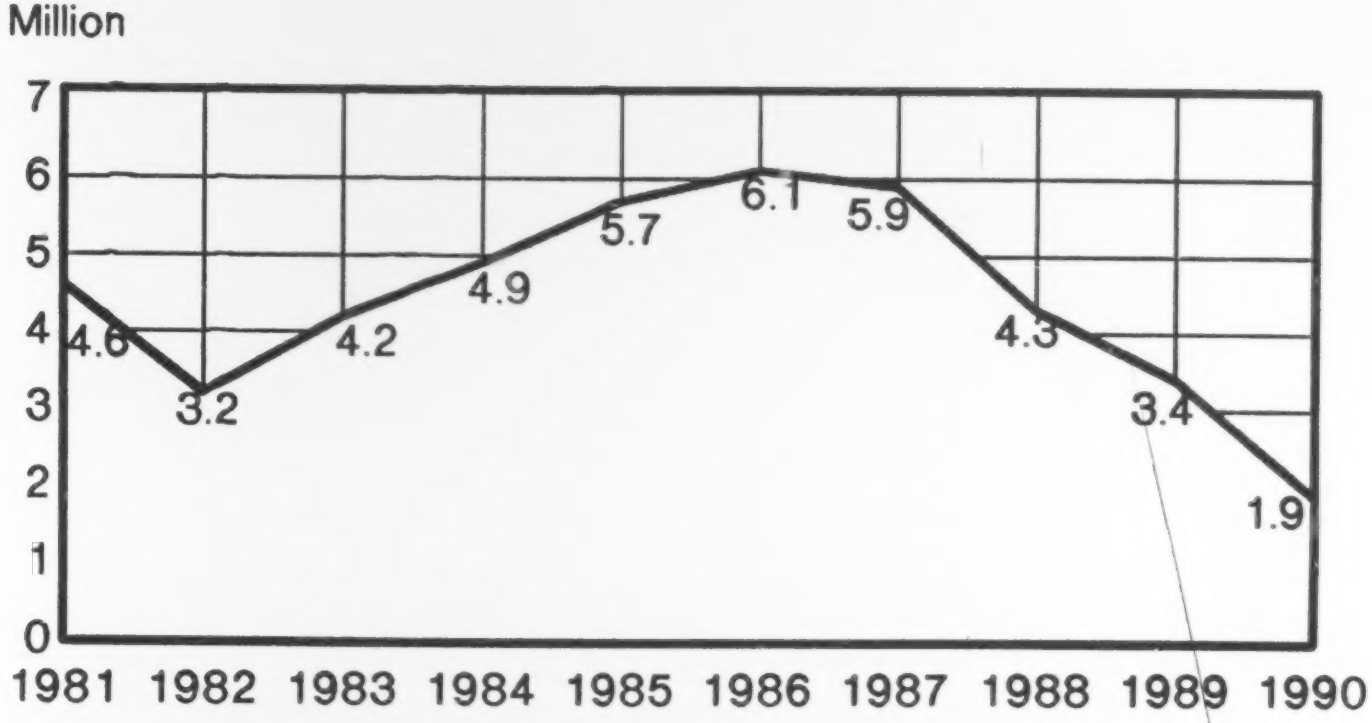
10 Year History



USA 20" Bicycle Market
10 Year History

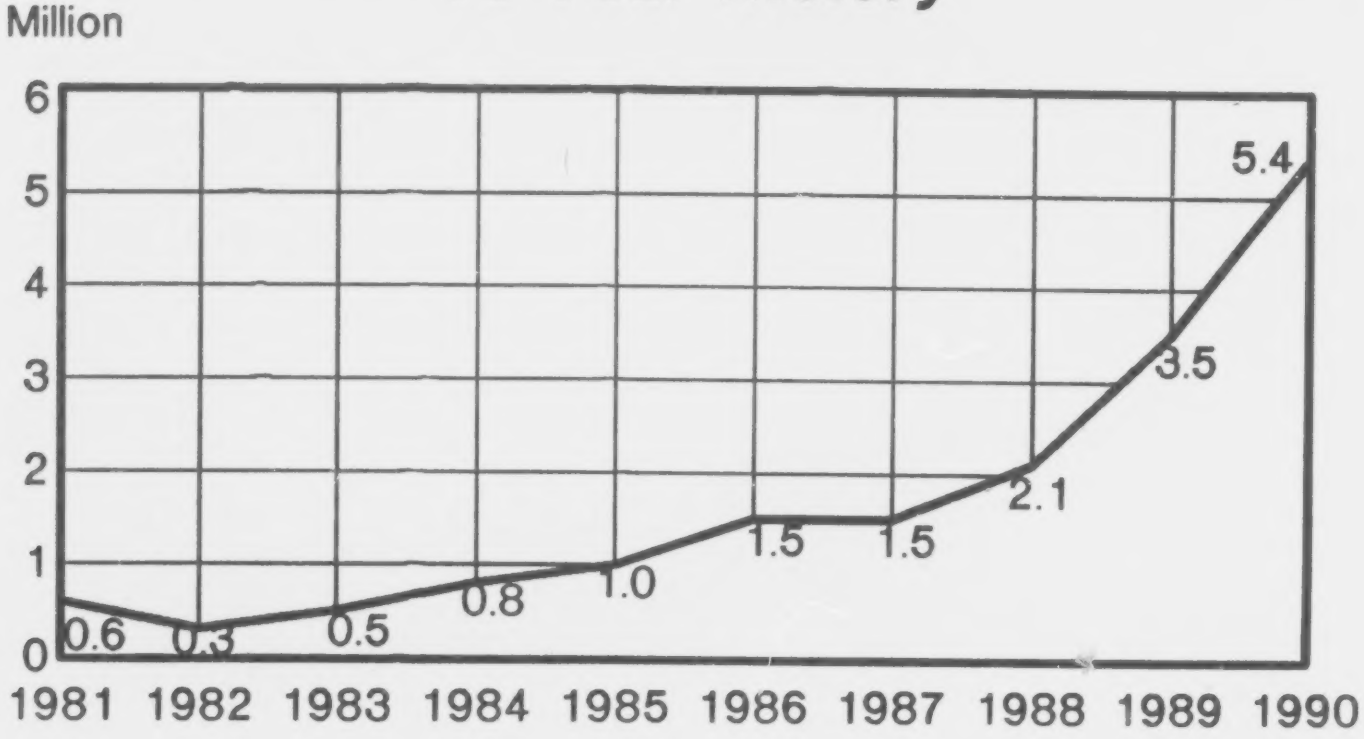


USA Lightweight Market
10 Year History



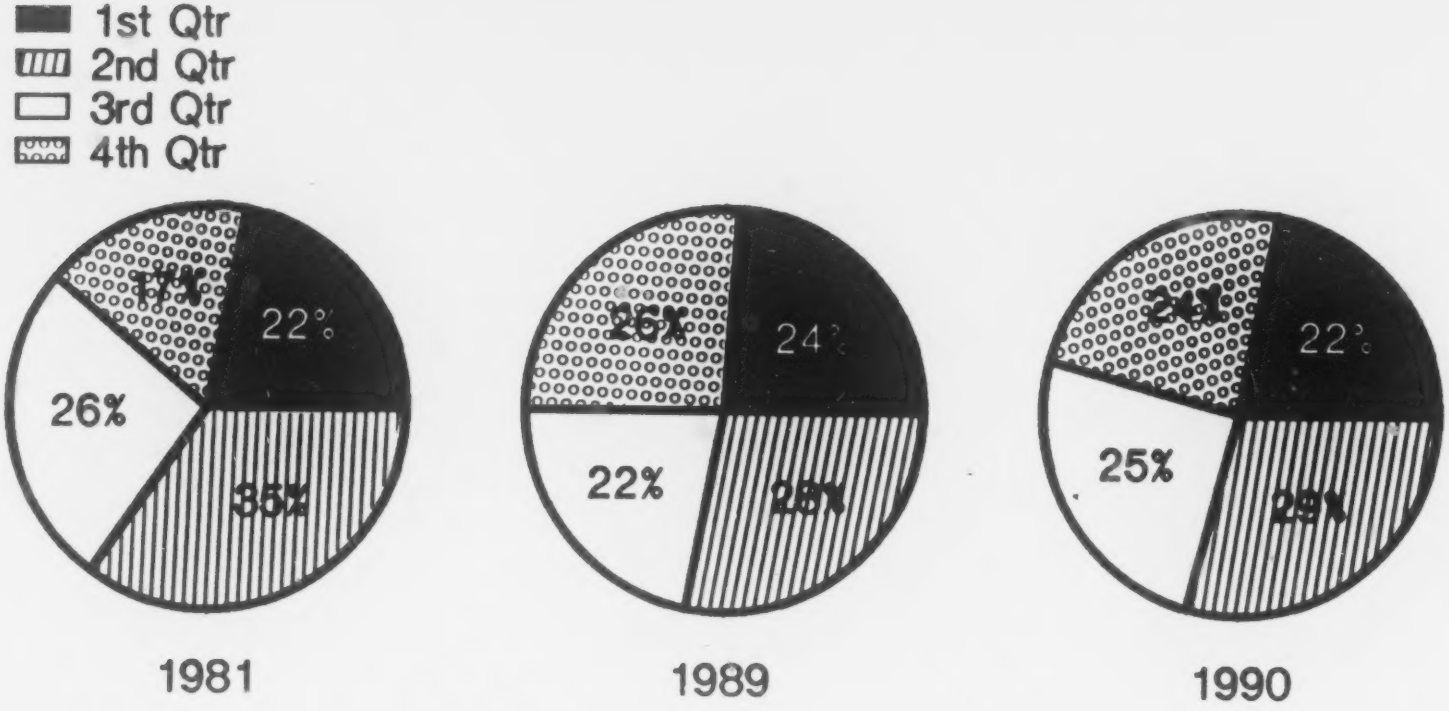
USA "Other" Bicycle Market

(ATB/Cruisers, Middleweights & All Others)
10 Year History

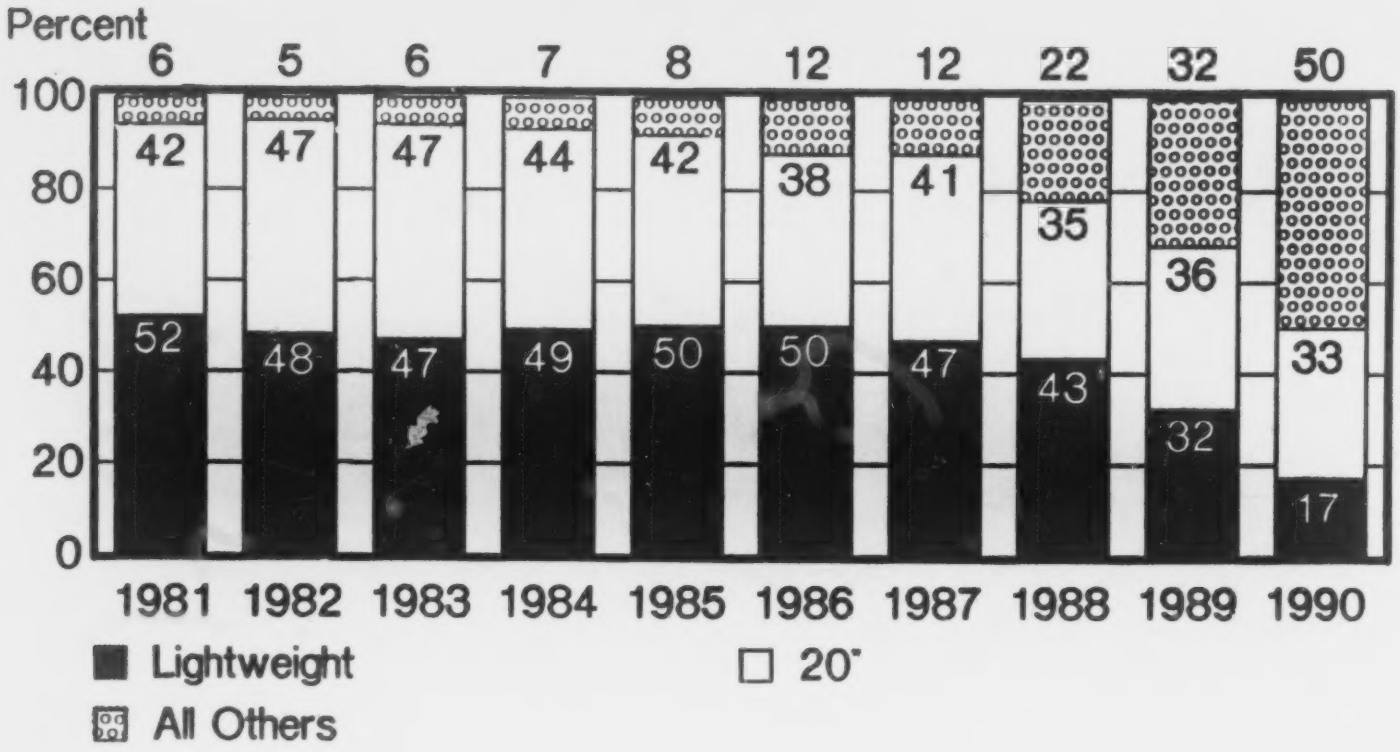


Bicycles Entering USA Market

Percent by Quarter 1981-1989-1990



USA Bicycle Market
By Category



Percent Bicycles Entering USA Market

Month	1981 Month	1981 Qtr. Cum.	1989 Month	1989 Qtr. Cum.	1990 Month	1990 Qtr. Cum.
Jan	4.7%		6.5%		6.5%	
Feb	7.7		8.6		6.9	
Mar	9.9	22.3%	8.4	23.5%	8.8	22.2%
Apr	11.9		9.9		10.7	
May	12.0		9.2		9.1	
Jun	10.3	56.5	8.7	51.3	8.9	50.9
Jul	9.5		7.6		8.6	
Aug	9.1		6.7		8.1	
Sep	8.3	83.4	7.9	73.5	8.0	75.6
Oct	8.6		10.6		10.0	
Nov	5.2		8.7		8.2	
Dec	2.8	100.0%	7.2	100.0%	6.2	100.0%
Total	100%		100%		100%	

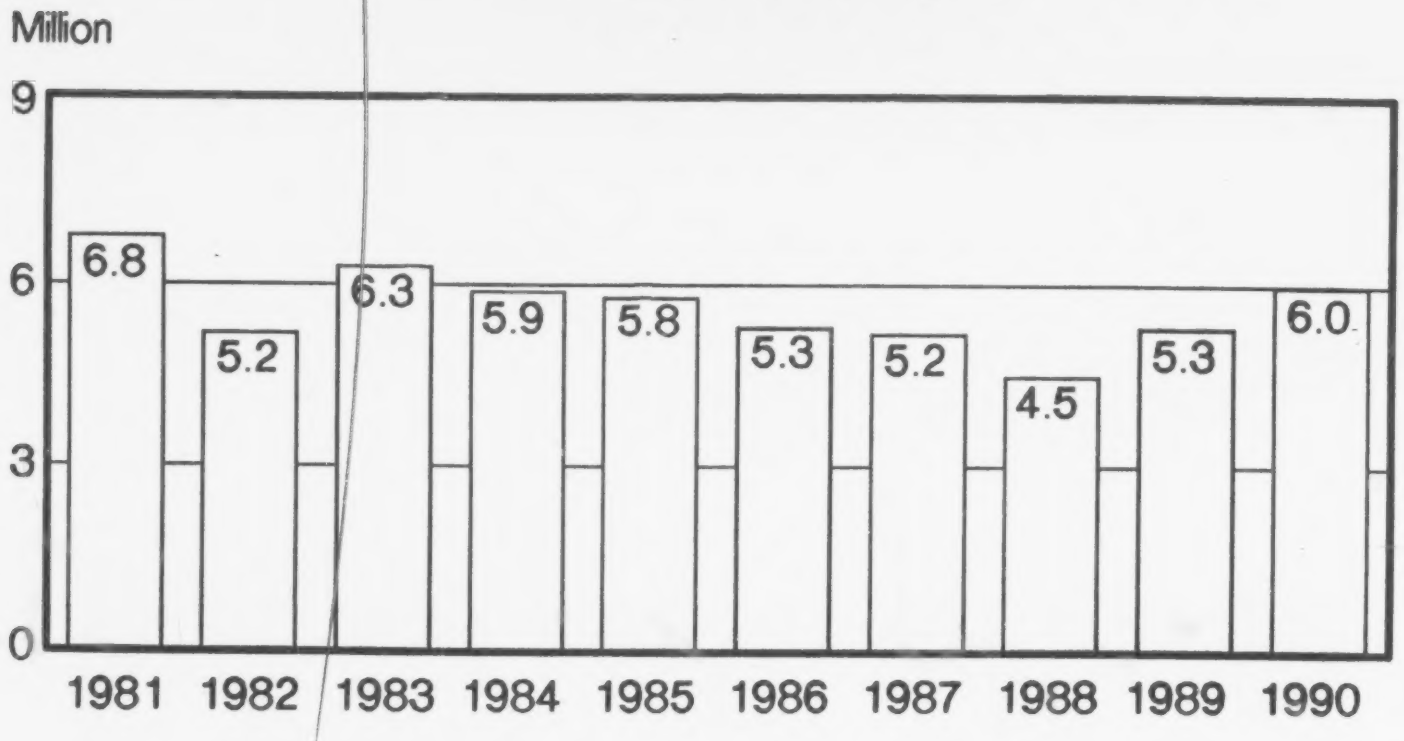
Domestic & Import Market Share
1990 vs 1989 By Major Categories

	1989			1990		
Category	Domestic	Imports	Total	Domestic	Imports	Total
20"	21.4%	14.5%	35.9%	20.7%	12.0%	32.7%
Ltw	10.2	21.8	32.0	7.0	10.4	17.4
All Other	18.3	13.8	32.1	27.7	22.2	49.9
Total	49.9%	50.1%	100%	55.4%	44.6%	100%

Domestic Produced Bicycles

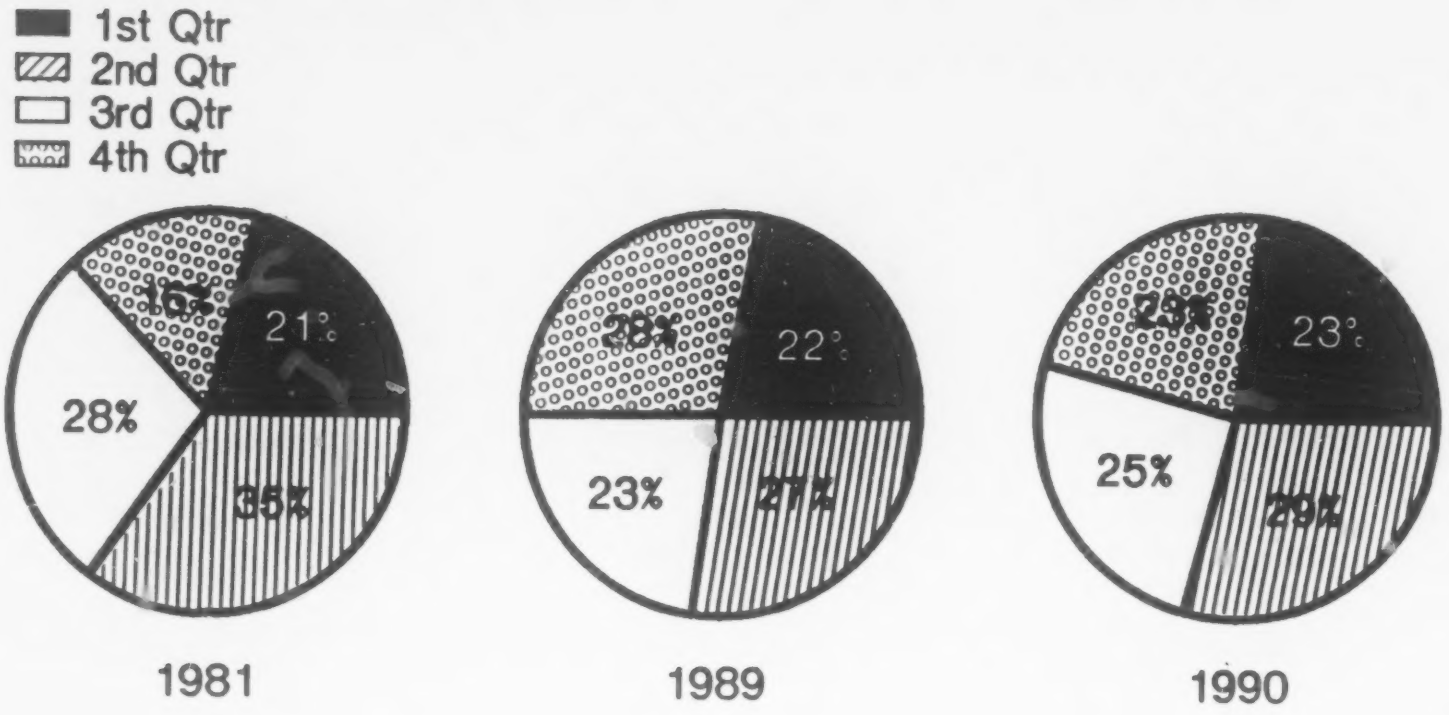
Domestic Bicycle Shipments

10 Year History



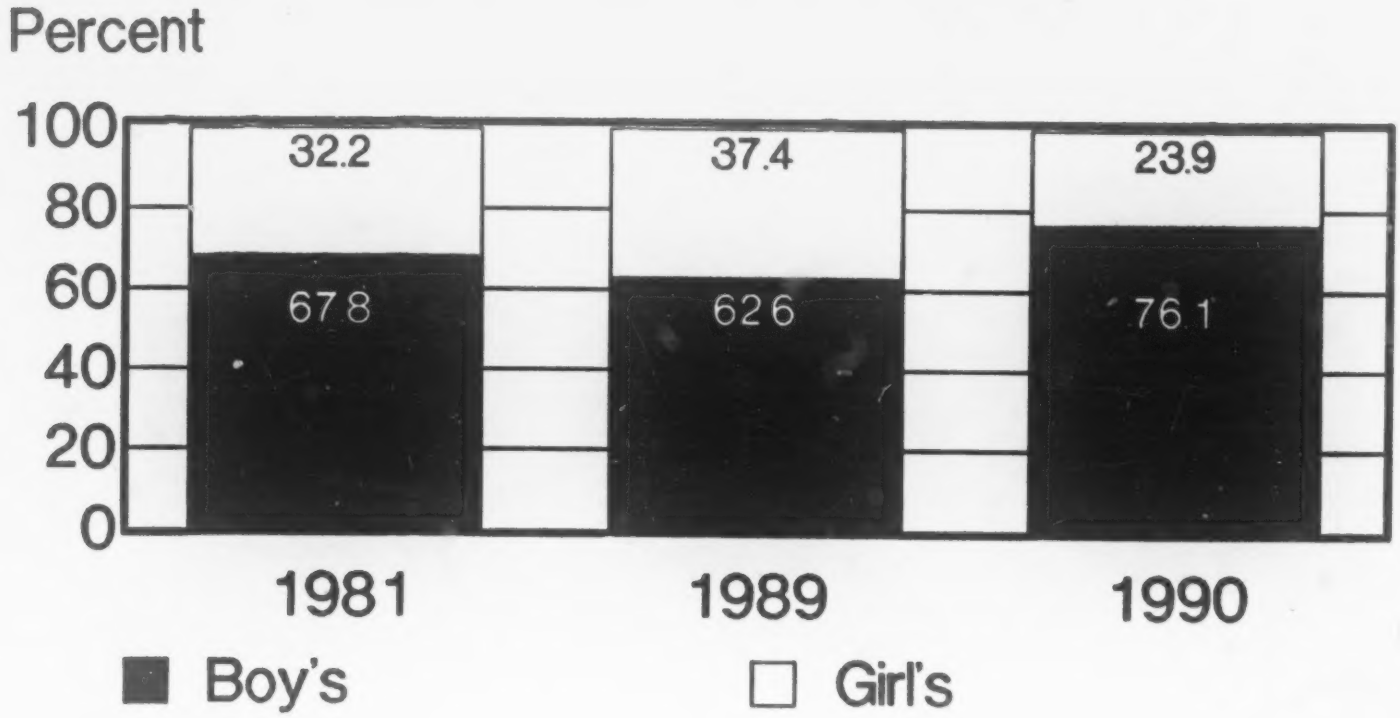
Domestic Bicycle Shipments

Percent by Quarter 1981-1989-1990



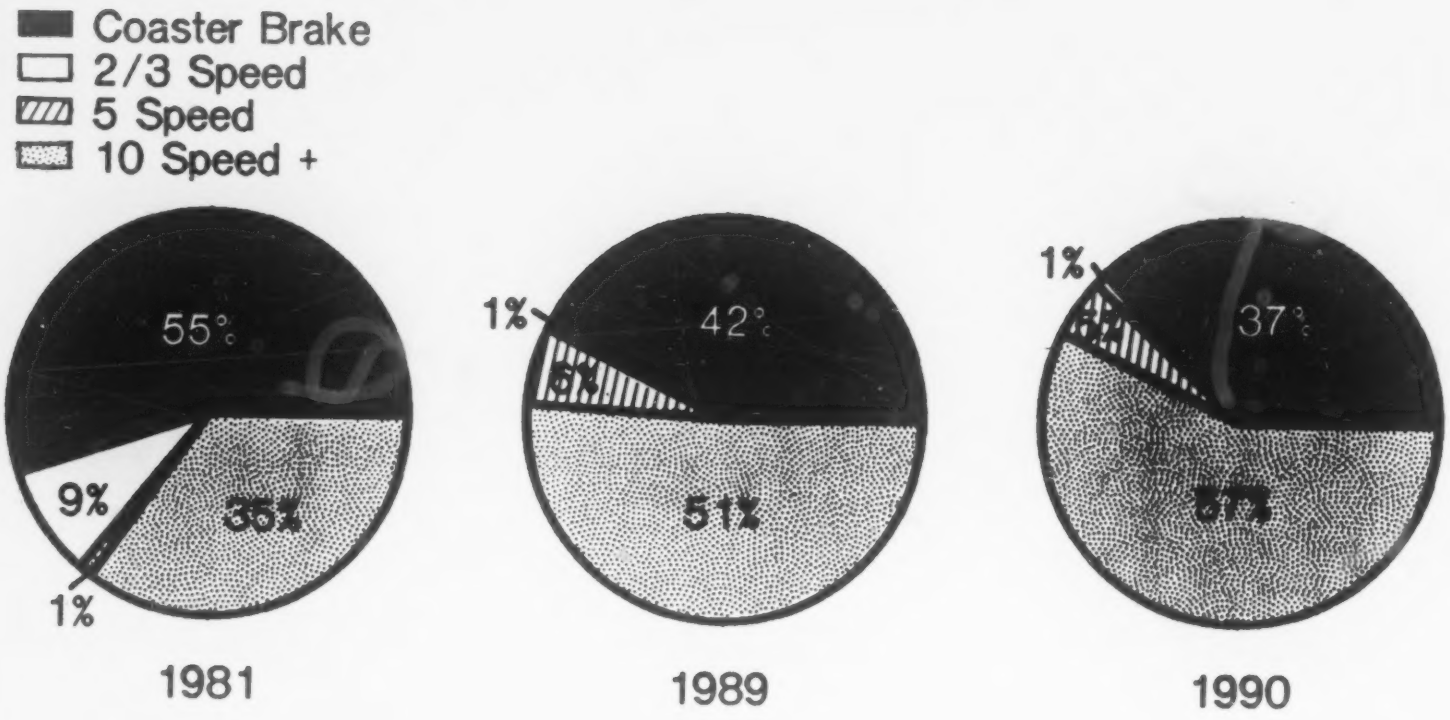
Domestic Bicycle Shipments

% Boy's and Girl's Models



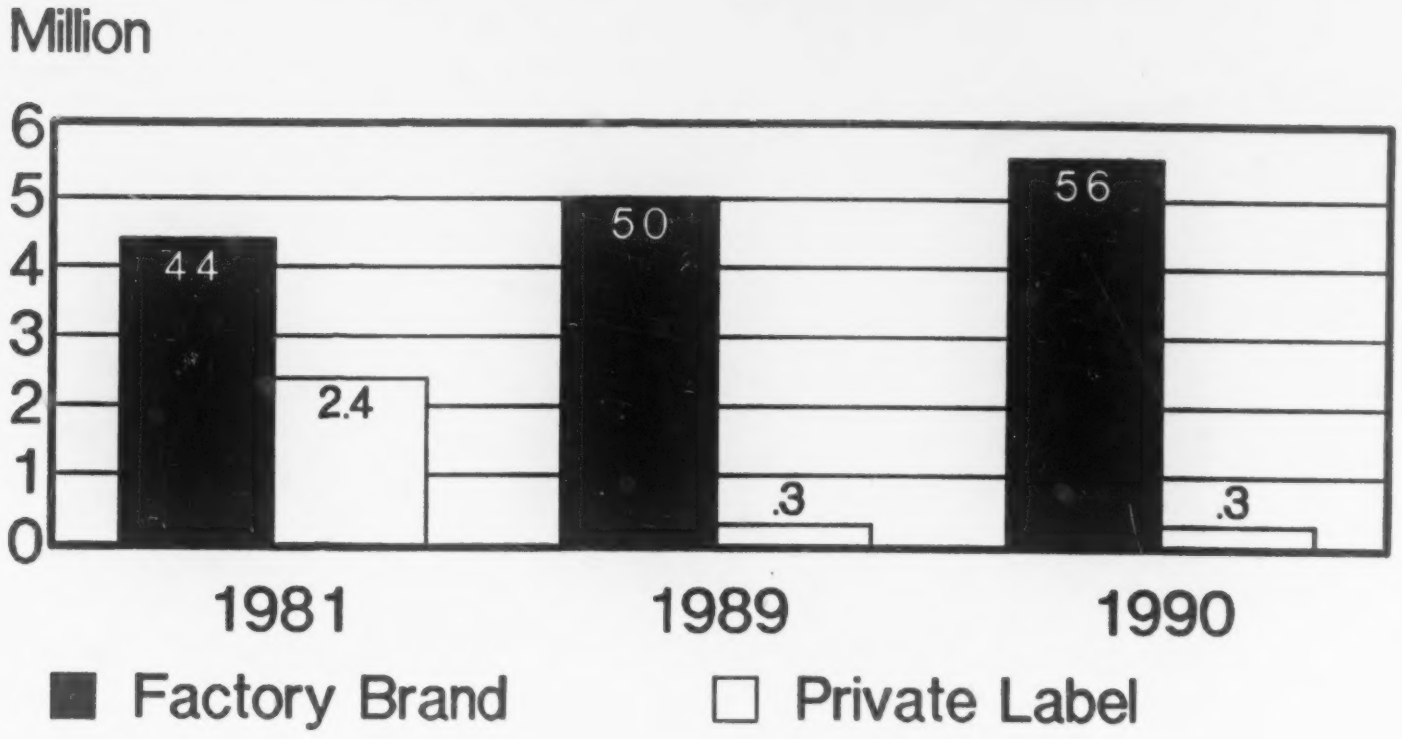
Domestic Bicycle Shipments

% By Type Hub

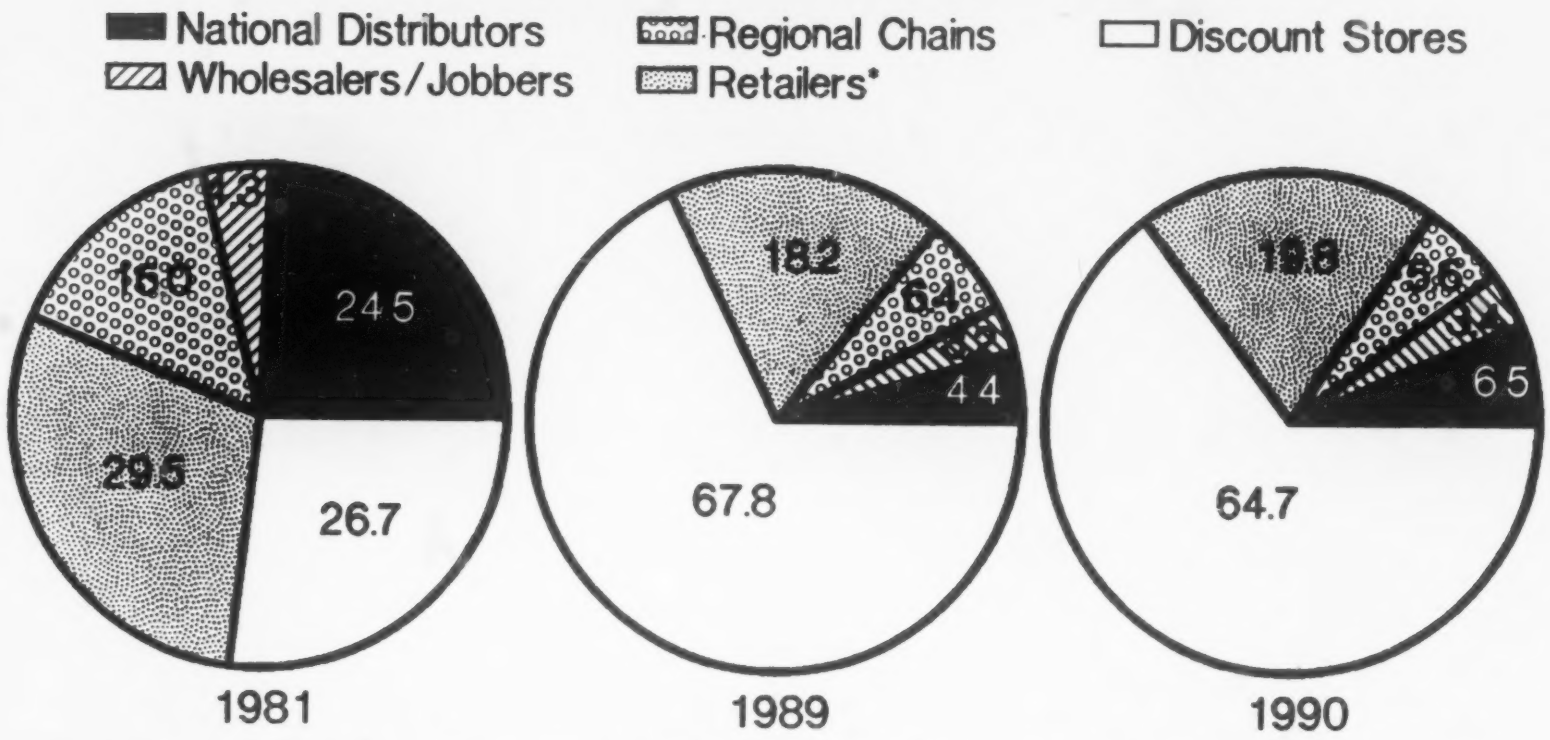


Domestic Bicycle Shipments

Factory Brand vs. Private Label



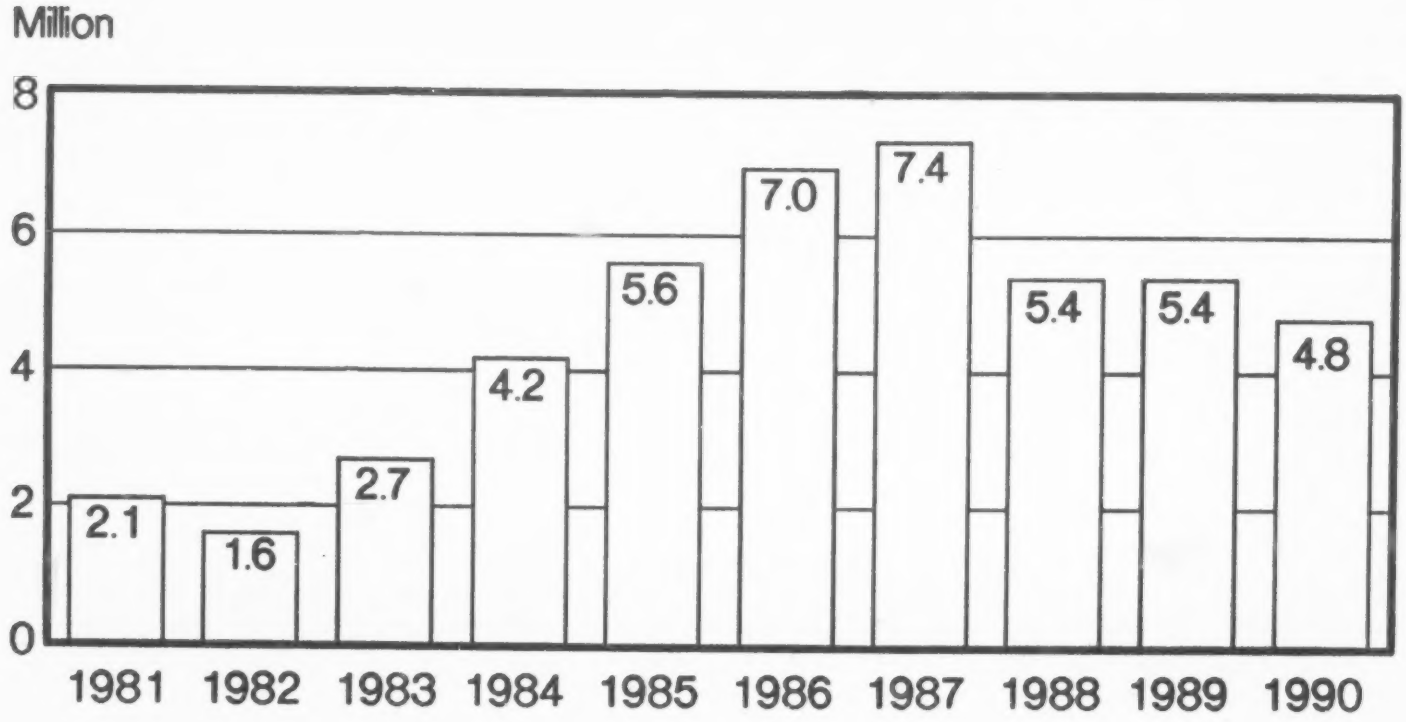
Where Domestic Manufacturers Sell Their Bicycles (%)



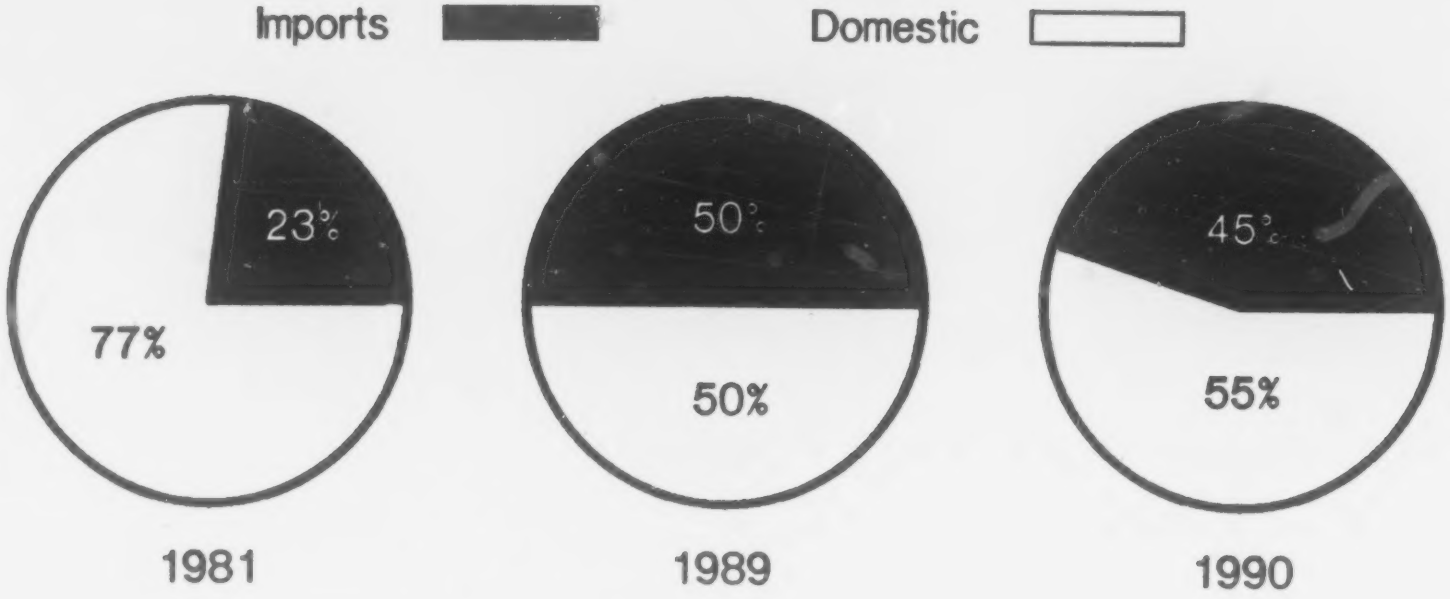
*Includes outlets not elsewhere classified such as bicycle shops, catalog showrooms, etc.

Imported Bicycles

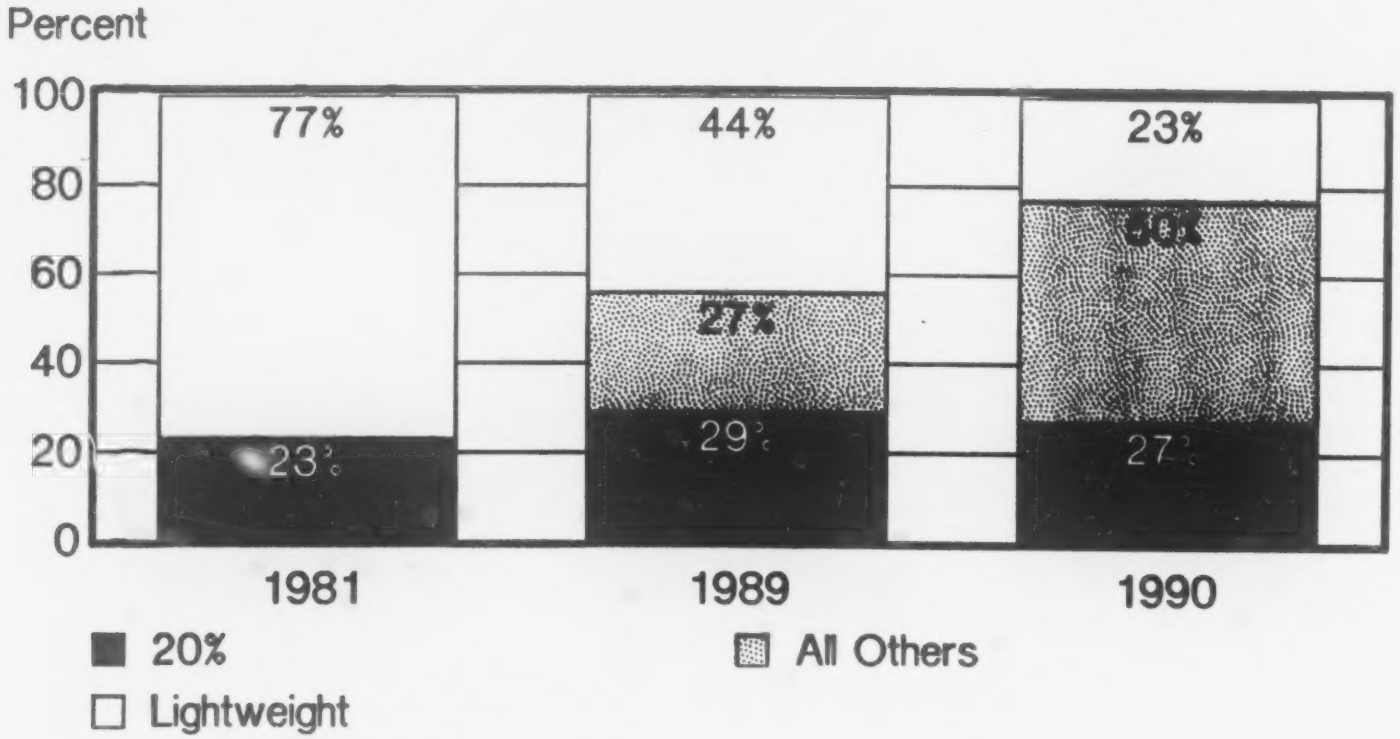
Imported Bicycles
10 Year History



Imported Bicycles
% Share 1981-1989-1990

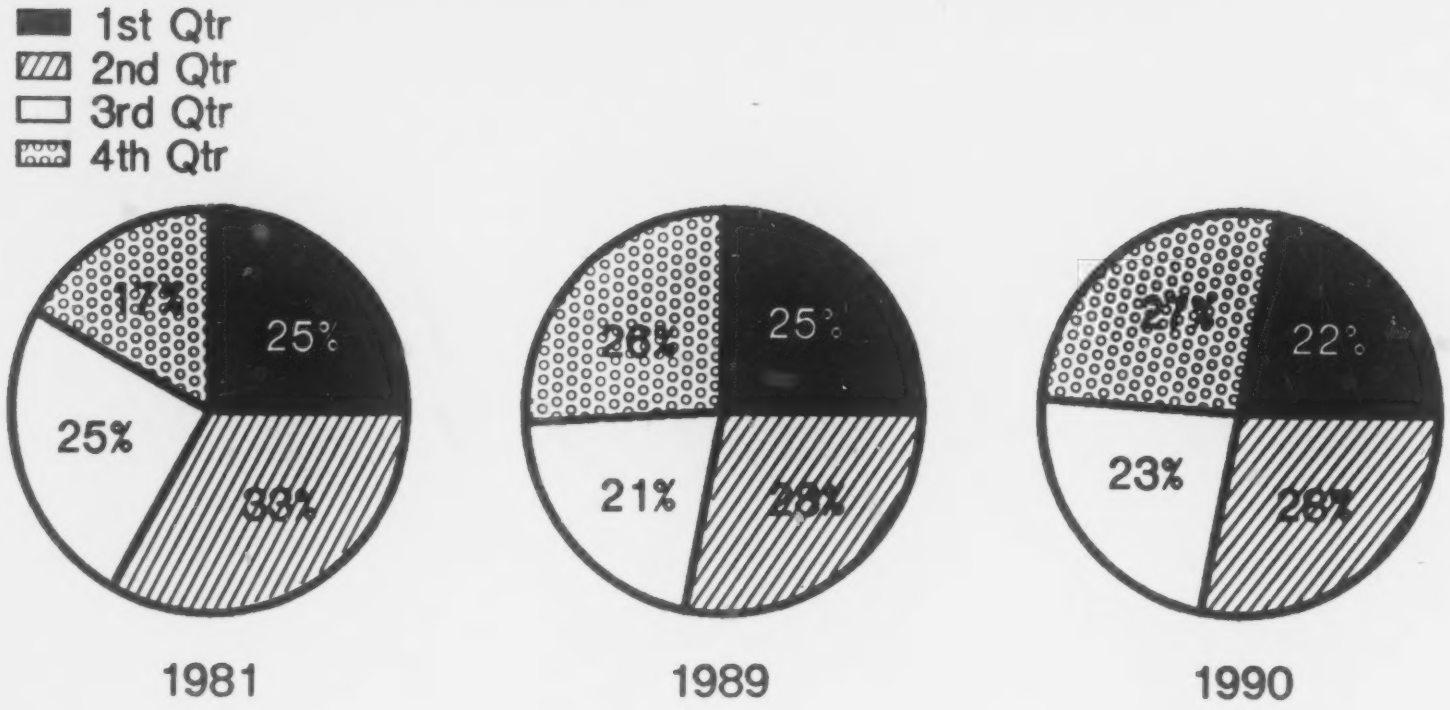


Imported Bicycles
By Type



Imported Bicycles

Percent by Quarter 1981-1989-1990



Imported Bicycles

1989-1990 Monthly Comparison (000)

Year	1989	1990	%Chg
Jan	369	371	1
Feb	494	272	(45)
Mar	460	395	(14)
Apr	478	433	(9)
May	552	484	(12)
Jun	497	449	(10)
Jul	428	400	(7)
Aug	302	353	17
Sep	400	368	(8)
Oct	450	382	(15)
Nov	484	461	(5)
Dec	436	442	1
Total	5350	4810	(10)

Imported Bicycles

Percent by Country of Origin

Country of Origin	1981	1989	1990
Taiwan	52.1%	73.2%	73.8%
Korea	6.2	13.9	8.6
Japan	31.3	1.9	1.9
China	.1	6.5	10.0
Hong Kong	.3	.7	1.5
Thailand	NA	2.6	2.8
France	3.0	.2	--
All Others	7.0	1.0	1.4
Total	100%	100%	100%

Average Dollar Value* Per Unit of 20" Bicycle Imports

Country	1982	1983	1984	1985	1986	1987	1988	1989	1990
Taiwan	51.00	51.69	46.24	42.10	42.15	50.98	49.66	42.76	53.69
Japan	93.73	104.88	105.08	99.94	118.86	82.09	150.00	61.43	110.41
Korea	50.68	35.45	45.55	43.03	40.23	42.19	42.52	43.25	44.43
China	NA	NA	NA	NA	NA	20.37	19.12	25.29	28.55
Hong Kong	NA	NA	NA	NA	NA	NA	NA	38.30	28.59
Thailand	NA	NA	NA	NA	NA	NA	NA	42.32	45.41
Average	$ 53.37	$ 54.41	$ 47.54	$ 43.61	$ 43.04	$ 49.89	$ 46.28	$ 40.81	$ 45.79

*Estimated Customs Value FOB Foreign Port

Average Dollar Value* Per Unit of Lightweight Bicycle Imports

Country	1982	1983	1984	1985	1986	1987	1988	1989	1990
Taiwan	61.75	58.08	57.46	51.34	53.09	74.68	89.84	88.59	115.12
Japan	114.73	110.41	121.36	107.79	139.02	160.18	195.37	232.72	251.35
Korea	58.56	54.43	53.16	48.23	45.59	43.44	48.92	55.82	61.48
China	NA	NA	NA	NA	NA	51.04	53.48	56.88	74.84
Hong Kong	NA	NA	NA	NA	NA	NA	NA	68.18	73.73
Thailand	NA	NA	NA	NA	NA	NA	NA	50.10	52.32
Average	$ 83.80	$ 75.59	$ 73.22	$ 63.50	$ 64.45	$ 76.37	$ 83.56	$ 83.88	$ 103.26

*Estimated Customs Value FOB Foreign Port

Average Dollar Value* Per Unit of Other Bicycle Imports**

Country	1982	1983	1984	1985	1986	1987	1988	1989	1990
Taiwan	75.19	68.49	63.75	69.66	74.87	87.16	108.70	120.06	126.46
Japan	174.01	186.67	158.50	147.77	192.78	208.48	256.80	256.26	245.17
Korea	NA	NA	57.48	53.66	47.10	42.87	50.67	67.70	81.68
China	NA	NA	NA	NA	NA	NA	45.53	90.28	105.97
Hong Kong	NA	NA	NA	NA	NA	NA	NA	95.11	53.66
Thailand	NA	NA	NA	NA	NA	NA	NA	50.04	58.92
Average	$ 81.08	$ 86.17	$ 73.83	$ 75.40	$ 81.47	$ 83.77	$ 114.17	$ 119.15	$ 114.17

*Estimated Customs Value FOB Foreign Port
**TSUS Items 732.2100 & 732.2400 Includes Primarily ATB Bicycles

Summary

- A Total of 10,790,000 Bicycles Entered the USA Market During 1990, Up 1.1% Over 1989 and 5.5% Above the 10 year Average of 10,228,000 Units.
  - –20" Bicycles were Down 8% Compared to 1989.
  - –Lightweight Units were Down 44%.
  - –ATB and All Other Units were Up 54% in 1990.
  - –Volume of Bicycles Entering the USA Market was Greatest in the Second Quarter, Followed by the Third Quarter, Fourth Quarter and First Quarter, in that Order.

Summary

- Domestic Shipments Were 5,980,000 Up 12.4% Over 1989 and Up 6.5% Over the 10 Year Average of 5,616,000
  - -Most Units Since 1983
  - -Domestic Shipments Represented 55% of the Total Market Up from 50% in 1989.
  - -29% of the Domestic Shipments were Made in the Second Quarter, 25% in the Third Quarter and 23% in Both the First and Fourth Quarters.

Summary

- Imports at 4,810,000 Dropped 10% from 1989, but Remained 4.3% Above the 10 Year Average of 4,613,000.
  - –Over 7 Out of 10 Imports Originated in Taiwan, Same as 1989.
  - –Imports from China Amounted to 10% of the Total, Replacing Korea as the Second Largest Source of Imports.
  - –Taiwan, China and Korea Accounted for Over 92% of All Imports.
- Average Prices of Imports:
  - –20" Units $45.79 Up 12.2% From 1989.
  - –Lightweight Units $103.26 Up 23.1% From 1989.
  - –ATB and All Other Units $114.17 Down 4.0% From 1989.

Summary

- Finally, With the 1990 Bicycle Market Exceeding the 10 Year Average by 562,000 Units and 1990 Surpassing the Strong 1989 Market by 1.1%, The BMA Continues to Look for a Favorable Bicycle Market in 1991.